Helpline Procedure   Updated: 12/17/23

From your computer workstation or laptop.

Navigate to and open MG ACES page:
(this is where you log your volunteer hours)
www.acesagmg.site/login.php

- Log-in using your **personal username** (email) **and password**.

Master Gardener Service Report

Login
First Visit? CLICK HERE to register and begin participating.

Email

Password

> Now would be a good time to enter your hours.

- Select "Helpline Desk" on the bar at the top of the page.

Helpline Desk | S

You are now on the MG Helpline Desk page!
Working the Helpline Desk, you will perform three functions; 1) Check and respond to new "Voice/Email Inbox" messages. 2) Review and respond to "Pending/Referred" open reports. And 3) Open a "+New Report", if you are working in the office where the HL phone is located.

1) **Check "Voice/Email Inbox" for new messages.**
   Note: If there are no messages go to Step 2.

   The inset box on the right indicates the number of messages in the Inbox.

Voice/Email Inbox 2

1.a)   Listen to or review the message(s) and start a "New Client/New Report" as appropriate. Delete Robo calls and junk mail.

New Client/New Report   Delete Email

1.b)   Use the "EDIT CLIENT? button to update Client contact and geographical data. Remember to Submit.

1.c)   In the Report Details box complete all available information for a new report and then "Save"

REPORT DETAILS

REPORT METHOD/SOURCE

⦿ TEL   ◯ IN-PERSON   ◯ EMAIL
(tel)

BASIC DESCRIPTION

1.d)   **It may take a couple of minutes but this new report may now be viewed in "All Reports", "Pending/Referred".

1.e)   If needed, call the client to get additional information and document it in the report. If you cannot contact the client, note "left message" or "no answer" in Report Details, Recommendation Given box.

1.f)   Record as much information as possible (Scope, Environment, Diagnosis, etc...). This will be useful for follow-up or review of Pending reports.

1.g)   **If the Client info page contains an email address**, you may email the client by selecting the "@Send Email" button from the Report page (if you don't see the "Send Email" button, make sure you entered the email address).

1.h)   When sending an email you may Copy/Paste website URL addresses into the email for the client. Remember to
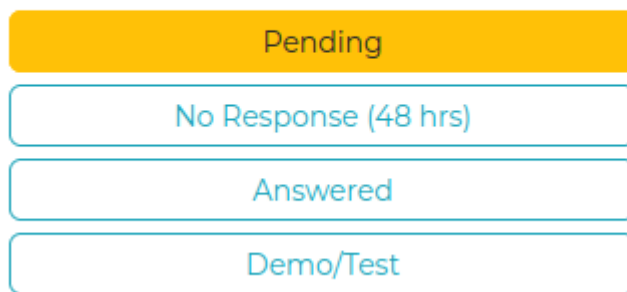
@Send Email

Send Photo Invitation

also note documents sent in the MATERIALS/PUBS SENT box. The "Send Photo Invitation" button may be used to send an automatic email to the client, requesting a photo. If the client replies to this invitation with photos, they will be linked to the open report.

1.i) When you have provided needed information to the client, change the status of the report from Pending to Answered. If there is no contact with the client for two days, change the status to No Response (48 hrs). Remember to Save your work.

1.j) If the client's request is beyond the scope of the Master Gardener working, you may Refer the report to an Extension Agent. Ensure all relevant information is documented in the report. Select the "Refer to Specialist/Agent" button below the Report Details. Follow the instructions in the drop down box that appears and select "Send Request". The report status will automatically change to Referred.

2) Review and respond to "Pending/Referred" open reports.

During this step, you will be reviewing and responding to reports opened by other MG's. This is why it is important to document as much information as possible in the REPORT DETAILS area.

2.a) A list of Pending reports may be viewed under the "ALL REPORTS" tab, and the "Pending/Referred" tab. This list will also include Referred reports that are awaiting a response from an Extension Agent.

2.b) Review a report with "Pending" status by selecting the "EDIT/OPEN" button to view and determine if any follow-up is needed.

| 09-15-22 | #20960 | Amelia Harrington ameliaharrington@att.n **Desc:** Question about Magnolia tree. | pending | G. Hugh Nichols (0 - 28) | EDIT/OPEN |

2.c) If needed, call client and document info in REPORT DETAILS, or indicate "left message" or "no answer".

2.d) After three attempts, or two days, of attempting to contact client, document as unable to contact Client. Change status to "No Response (48 hrs)".

2.e) If you are able to contact and/or provide client with information, update Report Details, and ensure client information has been updated using the "EDIT CLIENT" button. Change report status to "Answered" and "SAVE" report.

2.f) If a Photo Invitation had been sent, the client reply will appear in the "Voice/Email Inbox". There will be an option to link the client's reply to and existing "Open" report. This will avoid opening two reports for the same client call/issue.

2.g) If a referral to an Agent or Specialist is needed, update REPORT DETAIL with as much information as possible, select "Refer to Specialist/Agent" as described in 1)j above.

3) **If a call comes in on the Helpline phone, use the "+NEW REPORT" tab to start a new report.**

3.a) Once a new report is submitted/saved, you may EDIT/OPEN the report form the "ALL REPORTS" tab.

3.b) Use "EDIT CLIENT" to update Client (caller) contact and geographical data. Remember to Submit.

3.c) From the Report page you may update report details, change status, or REFER TO A SPECIALIST OR AGENT as described in section 1. Remember to SAVE your work often

Thank you for helping our community with their gardening and landscape needs.

Be sure to log your hours and number of contacts.

For assistance with the MG Helpline system, text or email Kerry Smith with a brief description of the issue. She will get back to you shortly.

Kerry Smith; text to 334 329-1051
Kerry Smith; email to smithkp@aces.edu